



Request for Proposal (RFP) for Strategic Operating Partner

1. Introduction

Unite America is seeking an experienced **Strategic Operating Partner** to work alongside our Strategy & Operations team to build the systems and capabilities needed to support our next stage of growth.

As Unite America has grown in size, reach, and complexity, our operational needs have grown with it. We aim to build a more scalable operating model—with integrated systems, repeatable processes, clear governance, and better visibility for organizational decision-making.

We are looking for a builder, not just an advisor: a partner who can bring dedicated capacity to translate our future-state goals into a roadmap and drive implementation alongside our team, while building internal capability and transferring ownership to Unite America over time.

The engagement may be led by an individual or firm. We do not expect the lead partner to personally hold deep technical expertise across every functional area. Rather, we are seeking a strong cross-functional operator who can integrate the work, make sound tradeoffs, maintain accountability for the overall roadmap, and identify and manage specialized expertise when needed.

2. Background

Unite America is a non-partisan, philanthropic venture fund composed of several legal entities that invests in candidates, campaigns, and organizations to advance nonpartisan election reforms that foster a more representative and functional government capable of solving America's most pressing challenges.

Founded in 2014, Unite America has grown to be a leader in the democracy reform movement. We mobilize philanthropic and political capital to support candidates and reform campaigns across the country.

As the organization's strategy, resources, and operational complexity have grown, we have increasingly invested in the infrastructure necessary to support that work. Our Strategy & Operations function encompasses Finance, Legal & Compliance, People & Culture, and Enterprise Systems & Operations.

3. Scope of Work

The Strategic Operating Partner will serve as an embedded partner to the Head of Strategy & Operations and work alongside existing functional leaders and staff.



The partner will be expected to:

- Assess our current operating model and future-state goals and translate them into a sequenced transformation roadmap, including recommendations about what to prioritize, defer, simplify, or stop. Establish clear owners, dependencies, milestones, decision points, and measurable outcomes.
- Design and drive implementation of our enterprise systems roadmap, ensuring systems integrate and information is entered correctly.
- Codify how the organization operates through the SOPs, playbooks, templates, dashboards, decision frameworks, and operating rhythms necessary to reduce manual work, institutional knowledge, and single points of failure.
- Lead complex cross-functional implementation and change management, moving priority initiatives from design through adoption rather than stopping at recommendations, and ensuring new systems and processes are actually used across the organization.
- Serve as the integrator across the transformation, identifying, bringing in, and managing specialized expertise—such as fractional finance leadership, ERP implementation, technology/data specialists, or other technical resources—when needed. The Strategic Operating Partner will remain accountable for sequencing this work, resolving cross-functional dependencies, and maintaining one integrated transformation roadmap.
- Build internal capability and transfer ownership to UA, leaving behind documented systems, trained owners, clear governance, and the internal capability to operate and continuously improve the new model after the engagement ends.

Illustrative Outcomes

- Leaders have timely visibility into actuals, commitments, available resources, fundraising assumptions, and forecasts.
- Program, Investor Relations, and Finance operate from shared assumptions and an integrated planning and forecasting process.
- A new ERP supports reliable, multi-entity financial management and reporting.
- Legal & Compliance has centralized systems for training, obligations, deadlines, filings, approvals, and documentation.
- Staff can see the status, ownership, and expected timing of routine requests and approvals.
- AI and automation reduce administrative work, duplicate data entry, and manual reconciliation.
- UA has repeatable models for launching new initiatives and entities without rebuilding its operational foundation.
- Core workflows have documented SOPs, owners, decision rights, and escalation paths.
- Mission-critical processes have sufficient documentation and redundancy to reduce reliance on institutional knowledge and key-person dependencies.



4. Engagement Parameters

- **Structure:** Contract engagement
- **Reporting:** Head of Strategy & Operations.
- **Approach:** Embedded strategic partner working alongside the internal team, with targeted use of specialized experts as needed.
- **Location:** Remote work is acceptable, with travel and in-person collaboration as mutually agreed.

5. Qualifications

We are looking for a senior operator or operator-led firm with a track record of personally leading significant operational transformations. We value experience gained from holding accountable operating leadership roles—not solely advising organizations on transformation—and welcome former COOs, Heads of Operations, Strategy & Operations leaders, and others with comparable experience. The ideal partner will bring:

- Significant experience designing and scaling Strategy & Operations, Shared Services, or similar functions in complex or growing organizations.
- Demonstrated success personally leading operational transformations from diagnosis and design through implementation, adoption, and transition to internal ownership. Candidates should be able to point to systems, processes, governance structures, or operating capabilities they implemented—not solely strategies or recommendations they developed.
- Experience building integrated operating models that connect people, processes, technology, data, governance, and organizational structure.
- Experience implementing scalable infrastructure for multi-entity organizations, new initiatives, or business lines.
- Strong strategic, project management, and stakeholder leadership skills, with the ability to navigate ambiguity and work effectively with executives and functional experts.
- A hands-on, collaborative approach that combines strategic thinking with practical execution, brings in specialized expertise when needed, and builds internal capability rather than long-term dependency.

Experience working with nonprofit, philanthropic, political, advocacy, or other highly regulated organizations is preferred but not required.

6. Proposal Submission

Interested individuals and firms are invited to submit a proposal that includes:

- **Consultant Overview:** Relevant experience and qualifications for this engagement.
- **Engagement Team:** Identify the individual who would serve as the primary Strategic Operating Partner, their expected level of involvement, and any other team members



expected to play material roles. For firms, proposals should distinguish between the senior relationship lead and the individual(s) who will be embedded in the day-to-day work.

- **Proposed Approach:** How you would prioritize and lead the transformation from roadmap through implementation, adoption, measurement, and transfer to internal ownership.
- **Specialist Model:** Describe which capabilities you expect the lead partner to provide directly versus where you would anticipate bringing in specialized expertise. Explain how you would select, manage, and integrate those specialists into the broader transformation.
- **Relevant Experience:** Two to four comparable engagements, including your role, what you implemented, and measurable results.
- **Engagement Scoping:** Inherent to the quality of candidate we seek is their ability to help us appropriately scope this endeavor. As such, while we have assumptions for the size and duration, we are asking experts to provide their estimate. The ability for a candidate to name the scope they foresee and what influences drive that projection will help us evaluate the candidate and the engagement
- **Fee and Capacity Structure:** Describe your proposed fee structure, anticipated duration and level of effort, expected involvement of the lead partner, assumptions underlying your pricing, and any specialist or third-party costs that would be additional. Clearly distinguish between core engagement costs and optional or anticipated specialist support.
- **References:** At least two references from comparable engagements.

We encourage proposals to be practical and concise. We are more interested in understanding how you work, what you have built, and the results you have achieved than in receiving an extensive presentation.

7. Proposal Submission Deadline

Proposals should be submitted by **Thursday, October 1st at 5:00pm MT.**

Unite America may invite a subset of respondents to participate in follow-up conversations before selecting a partner.

8. Contact Information

All inquiries and proposals should be directed to:

Chelsea Nunnenkamp
Head of Strategy & Operations
Unite America
chelsea@uniteamerica.org



9. Evaluation Criteria

Proposals will be evaluated based on the individual's experience, approach, cost, and references. Unite America reserves the right to reject any or all proposals.

Note: This RFP is not a contract and should not be construed as such. Unite America reserves the right to negotiate further with the selected individual and to modify the scope of work based on mutual agreement.

Thank you for your interest, we look forward to receiving your proposal.